FILOGIX
A FINASTRA COMPANY
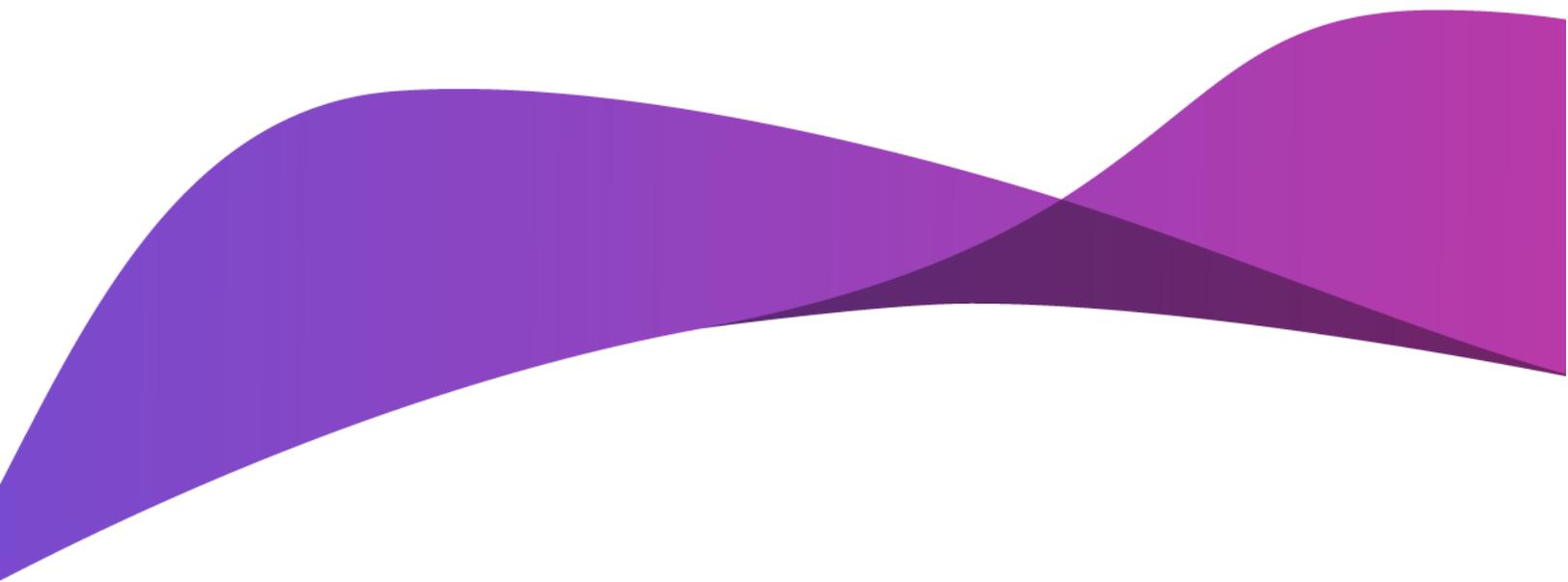
Canadian Mortgage Technology

Filogix Expert Release Notes

Release "EB 20.5"

Release Date: November 28, 2020

Contents

Overview

The November 2020 Expert Broker release includes various enhancements and maintenance fixes including:

- Ability to Generate Manulife's MPP Consumer Digital Links for Your Client(s)
- Employer Lookup Changes to Allow Address Searches
- Ability to Update Notification Emails
- Additional Payment Frequency Options – Mortgage Analyzer and Isolator
- Addition of Rate Type to the Mortgage Application Form
- Rebranding

Special Note: Everyone using Filogix Expert MUST clear your browser cache after the release. Instructions for clearing your browser cache are available from the Expert sign-on page and by accessing the provider's support sites using the links below:

Internet Explorer:
https://support.microsoft.com/en-ca/help/260897/how-to-delete-the-contents-of-the-temporary-internet-files-folder

Firefox :
https://support.mozilla.org/en-US/kb/how-clear-firefox-cache

Chrome :
https://support.google.com/chrome/answer/2392709?hl=en&ref_topic=7438008&co=GENIE.Platform%3DDesktop&oco=1

Ability to Generate Manulife's MPP Consumer Digital Links for Your Clients

You are now able to supply your clients with a unique link, allowing them to access their personalized Mortgage Protection Plan online application. Simply click on the "Applicant URL's" hyperlink in the Forms page of Filogix Expert to request your client's url's from Manulife. A window will be displayed with your client's name, personalized url and email address. Utilize the 'Copy Link' button for the applicant you wish to send the personalized link, this will copy the link to your computer's clipboard, then click on the applicant's email which will launch your default email provider. You can then paste the url in the body of the email.

Once you have entered the email's subject, message, signature, etc you can send the email to your applicant and allow them to complete their insurance application online. Repeat these steps for any applicants you want to allow to take advantage of this feature.

Note: Your firm needs to be signed up for the MPP service in order for it to be activated on this screen. This new feature does not change the existing MPP Request "Print" feature on the Forms screen. You are still able to access the PDF document from Manulife as you did previously.

Employer Look-up Changes to Allow Address Searches

You now have the option of entering either the employer's name or address when using the Employer Lookup feature in the Employment section of Filogix Expert. The additional option of entering an address allows you to ensure BFS/Self Employed and other scenarios that rely on the address as opposed to the employer's name can take advantage of the auto complete feature.

Ability to Update Notification Emails

You now have the ability to update the email address(es) that receive notifictions from Expert (eg Application assigned to you from another agent, new web referral, commitment received in Expert, etc). Under the Options tab, select Contact Information to view your settings. You can then enter / update your notification email(s). If you wish to have notifications sent to multiple emails, separate each email with a semi-colon (no spaces).

Note: This option is not available to all Filogix Expert users

Payment Frequency Options

The Mortgage Analyzer and Mortgage Isolator tools now include both accelerated and non-accelerated payment options for biweekly and weekly frequencies.
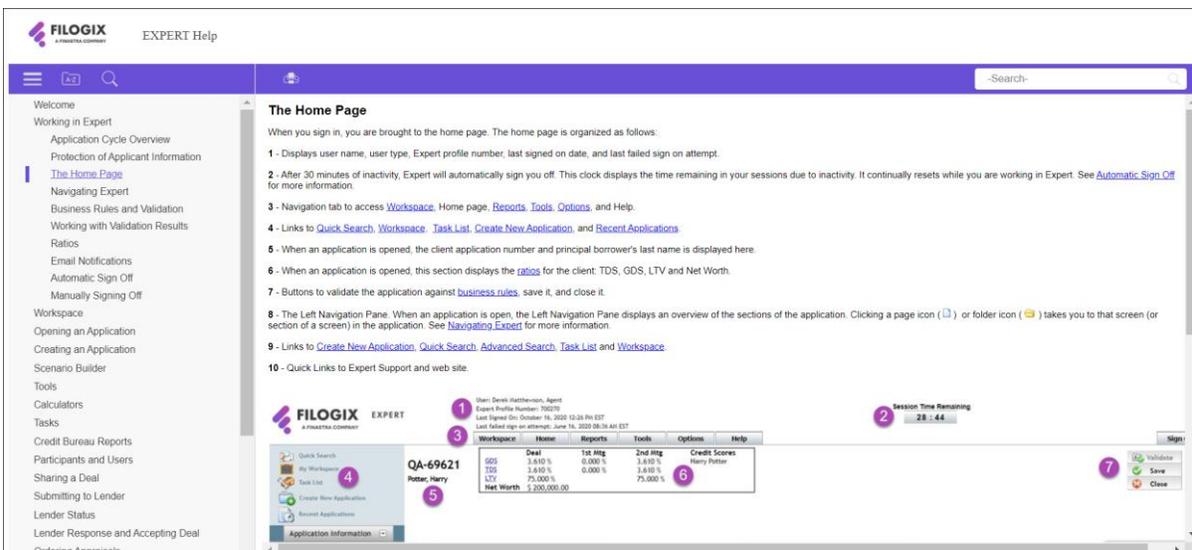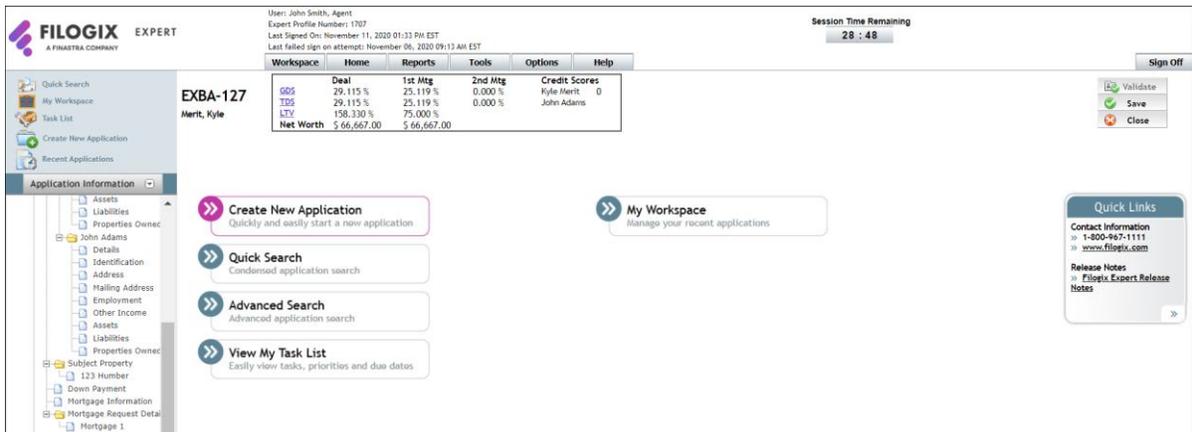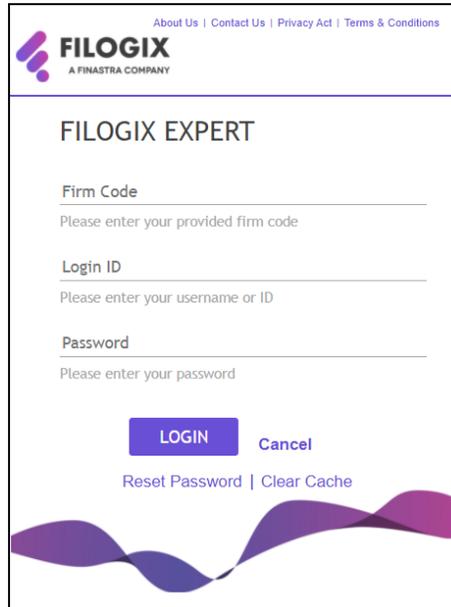

Addition of Rate Type to the Mortgage Application Form

The Mortgage Application form now contains the Rate Type value entered in your mortgage application.

Rebranding

Various elements within Filogix Expert have been updated to reflect the updated branding of Filogix. You'll notice cosmetic updates to the login screen, main pages, help files, etc.

Maintenance Items

Lender Drop Down Width and Ordering

In order to reduce wrapping of lender's with longer names, the lender drop down on the Lender Submit screen has been made wider. The ordering of lender names has also been updated to exclude case sensitivity.

Quick Links – Release Notes

You are now able to access Filogix Expert release notes using the Quick Links window on the right side of your home page.

Credit Bureau Business Rules

We have added hyperlinks, within the message text, to rules that relate to the credit bureau (missing, age, etc). This allows you to quickly access the Credit Bureau page when one of these rules fire.

Changes to Reflect the New Regulator in Quebec

Minor updates have been made to forms to reflect the new Quebec regulator (from OACIQ to AMF).

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About Filogix
Filogix has served as the hub of the Canadian mortgage industry for almost two decades, offering secure, reliable connectivity to brokers and lenders. We provide trusted mortgage lending products, that enable the effective management of the sales process from origination through underwriting. As the mortgage landscape continues to change, Filogix is prioritizing advances to support the industry into the future. We're investing in a more open infrastructure and building connectivity to create a complete mortgage marketplace, helping mortgage professionals do business with more choice, speed and reliability than ever before. Learn more at **filogix.com**

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